

ICMA-RC

User Id Creation and Enrollment Process

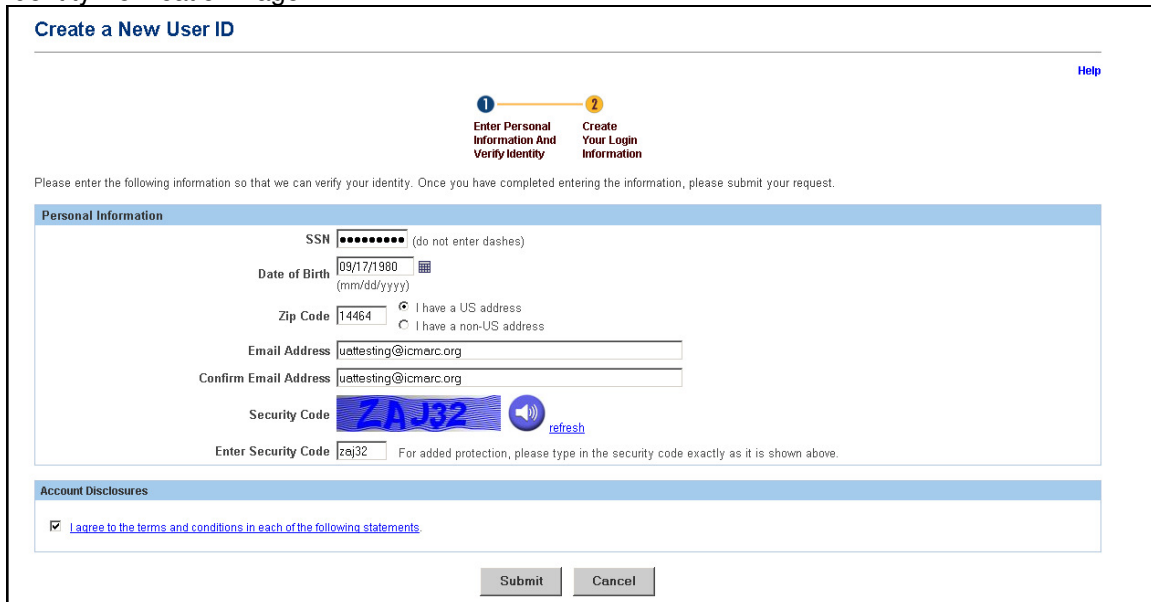
ICMA-RC Home Page (www.icmarc.org)



The screenshot shows the ICMA-RC Home Page. The header is blue with the ICMA-RC logo and navigation links: Home, Mobile Site, Login, Contact Us, and an Enter Search box. Below the header is a main banner area. On the left, there's a large image of a firefighter with the text "Building Retirement Security". On the right, there's a section titled "InvestSMART During Market Volatility" with a "Learn More" link. Below the banner, there are three columns: "Login" with a "Create an Initial User ID" button and links for Help, Login Process Instructions, Forgot Your User ID?, Forgot Your Password?, Reset Your Account Information, and Self Enrollment; "Participants" with a family photo and links for Manage your accounts, Plan for your retirement, and Learn about retirement savings plans; and "Plan Sponsors" with a woman's photo and links for Administer ICMA-RC plans, Establish new retirement savings plan, and Keep up with regulatory and legislative changes. Each column has a "Learn More" link at the bottom.

➤ Select "Create an Initial User ID"

Identity Verification Page



The screenshot shows the "Create a New User ID" page. At the top, there's a "Help" link. Below it, a progress bar shows two steps: "1 Enter Personal Information And Verify Identity" and "2 Create Your Login Information". The main heading is "Create a New User ID". Below this, a message says: "Please enter the following information so that we can verify your identity. Once you have completed entering the information, please submit your request." The form is divided into two sections: "Personal Information" and "Account Disclosures". The "Personal Information" section includes fields for SSN (masked with dots), Date of Birth (09/17/1980), Zip Code (14464), Email Address (uatesting@icmarc.org), Confirm Email Address (uatesting@icmarc.org), and Security Code (ZAJ32). There are radio buttons for "I have a US address" and "I have a non-US address". A "refresh" button is next to the Security Code field. The "Account Disclosures" section has a checkbox for "I agree to the terms and conditions in each of the following statements". At the bottom, there are "Submit" and "Cancel" buttons.

➤ Enter the required information then click "Submit".

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User ID and Password Creation Page

Create a New User ID

Help

Once you have completed entering the information, please submit your request. Please note, the account information for accounts that have not been accessed for 18 months will be deleted.

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Enter Personal Information and Verify Identity

Create Your Login Information

User Id

Create a new User ID and enter it in the User ID box.
(To see User ID requirements, click the help icon below. To check the availability of your User ID, click the "check mark" icon below.)

User Id (8-32 characters) ☒ [Help](#)

Confirm User Id

Password

Enter your new password. To see password requirements, click the help icon below.

Password (8-12 characters) [Help](#)

Confirm Password

Security Image

You must select a security image at this time.

This security image will be displayed to indicate that you are on the official ICMA-RC website.



Security Questions

Please answer 3 of the security questions. [Suggested Answer Format](#)

Question 1:

Answer 1:

Question 2:

Answer 2:

Question 3:

Answer 3:

eDelivery

☒ Yes, I would like to receive my quarterly statement via eDelivery.

☒ Yes, I would like to receive new confirmations via eDelivery.

By selecting eDelivery you will receive an email notification when these documents are available on Account Access instead of receiving them in the U.S. mail. Uncheck the option to receive the document in the mail.

☐ From time to time we email information about products, services, and events related to your retirement plan that we believe may be of interest to you. If you do not wish to receive future emails from ICMA-RC other than those you have specifically requested, such as e-delivery, please check the box.

To learn more about going paperless [click here](#)

Submit

Cancel

- Create user id and password.
- Select Security Image and Questions.
- Select eDelivery options.
- Click "Submit".

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Enrollment Welcome Pages

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Welcome

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Welcome, CHRIS P. BACON

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Welcome

Welcome to your employer's Deferred Compensation Plan sponsored by the ICMA Retirement Corporation!

We would like to take this opportunity to welcome you and to introduce you to ICMA Retirement Corporation (ICMA-RC) services available to you on-line.

We make it our business to provide you with quality service. Please take advantage of our services and let us know how we may improve them. Here is a sampling of the services available to you by using your personal User ID and Password:

FEATURES

- This site offers you *secure, timely access to your daily account balance* and allows you to make *investment changes on-line*.
- Information about your plan can be read online or printed on your printer through the site. Publications include the
 - [Making Sound Investment Decisions: A Retirement Investment Guide and Supplements](#), July 1, 2011 (180K)
 - [Retirement Investment Guide - Additional Information](#), July 1, 2011 (400K)
 - [A Tax Shelter for Your Future \(A Summary Of Your Deferred Compensation Plan\)](#)
- Confirmations will be sent to you for verification of all trades and account activity.

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Overview of Disaster Recovery and Business Continuity Plans

- Select the “Enroll” tab to begin the enrollment process.

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Enroll Participant

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Enroll Participant

In order to be able to take advantage of all the features of your employer's plan, you must be fully enrolled. Your employer has already provided much of your enrollment information that we need to activate your account. However, there are a few additional items that you'll need to provide.

1. Review and complete your Personal Information

This includes reviewing the information your employer has already provided, as well as providing us with your beneficiary designation and preferred investment allocation. Your preferred investment allocation will tell us how to invest the contributions made to your account. Please review information about the available investments by clicking on the Investments Tab above. You should read following documents

- [Making Sound Investment Decisions: A Retirement Investment Guide and Supplements](#), July 1, 2011 (180K)
- [Retirement Investment Guide - Additional Information](#), July 1, 2011 (400K)

(if you intend to invest in a Model Portfolio Fund) before you establish your investment allocation.

We'll ask you to verify your Personal Information before it is submitted. If it is correct and complete, you simply transmit it to us. Next you'll see a Confirmation screen, telling you that we have received your information, and giving you a timeframe for when your account will be ready to access. Please print this Confirmation screen for your records.

[Proceed](#)

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- Click “Proceed” to begin the enrollment process.

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Enroll Participant

Privacy Policy Notice
ICMA Retirement Corporation
VantageTrust Company
ICMA RC Services, LLC
VantageTrust Company
VantageTrust
The Vantagepoint Funds
Vantagepoint Investment Advisers, LLC
Vantagepoint Transfer Agents, LLC

Our Privacy Policy. Protecting your privacy is important to us. In providing financial services and investment products to you, we collect certain nonpublic personal information about you. Our policy is to keep this information strictly confidential, and to use or disclose it only as needed to provide services to you, or as permitted by law. Our privacy policy applies equally to our former customers and investors, as well as individuals who simply inquire about the services or investments we offer.

Information We Collect. The nonpublic personal information we have about you includes what you give us when you open an account, invest in The Vantagepoint Funds, or write or call us, such as your name, address, social security number, employment, investment objectives and experience, financial circumstances, and investment transactions and holdings.

Information We Disclose. We disclose nonpublic personal information about you to our affiliates, or to outside firms that help us provide services to you, for use only for that purpose. We will not give your name, address or other nonpublic personal information about you to third parties for any other reasons, except as authorized by you or as permitted or required by law.

How We Safeguard Your Information. We restrict access to nonpublic personal information about you to those persons who need to know it or who are permitted by law to receive it. We maintain physical, electronic and procedural safeguards to protect the confidentiality of your information.

If you have any questions regarding our privacy policy, please contact us at 1-800-730-7450.

If you have read this policy, please confirm below.

[Confirm](#)

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- Click “Confirm” to acknowledge the Privacy Policy and proceed with enrollment process.

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Personal Information Page

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Enroll Participant

Please enter your personal information in the fields shown below.

NOTE

- Your request is not complete until the receipt of a confirmation number.

Personal Information

Gender * <input checked="" type="radio"/> Male <input type="radio"/> Female	Marital Status <input checked="" type="radio"/> Single <input type="radio"/> Married	
Mailing Address * <input type="text"/> 123 NOTAGAIN LANE APT 2		
City * CORAL SPRINGS	State * FL	Zip * 33321 -
Daytime Phone * 202 - 962 - 4600	Evening Phone 954 - 545 - 5864	
Job Title <input type="text"/>		
Email Address luotesting@icmarc.org		
Reenter Email Address luotesting@icmarc.org		

* Required Fields

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➤ Enter/Update Personal Information then click “Next”.

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Beneficiary Designation Page

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Enroll Participant

Please enter your primary and contingent beneficiaries in the fields shown below.

NOTE

- You must select **P** for Primary or **C** for Contingent under type for each beneficiary, as well as a name, relationship, and percentage.
- Certification for Married Participants with Non-Spousal Designations**
 - Please note that a married participant must name his/her spouse at 100% or provide a signed statement from the spouse indicating the waiver of the right to be named the 100% primary beneficiary. To provide this waiver click [here](#) to download the Employee Information Change Form. Fill it out completely, have your spouse sign it and mail or fax to ICMA-RC.
 - Please note that if any primary beneficiaries are chosen the percentages for all primary beneficiaries must total 100%. The same rule applies to contingent beneficiaries.
- Your request is not complete until the receipt of a confirmation number.

BENEFICIARIES Marital Status: Single [Change Personal Info](#)

Type*	Last Name OR Trust/Charity/Estate Name	First Name	Birth Date	Relationship*	SSN	Share*
<input type="radio"/> P	Patterson	Jill	04 / 11 / 1969	Other	555 - 50 - 5555	100 %
<input type="radio"/> C	holt	paul	10 / 19 / 1979	Other	- - -	100 %
<input type="radio"/>			/ /		- - -	%
<input type="radio"/>			/ /		- - -	%
<input type="radio"/>			/ /		- - -	%
<input type="radio"/>			/ /		- - -	%
<input type="radio"/>			/ /		- - -	%
<input type="radio"/>			/ /		- - -	%
<input type="radio"/>			/ /		- - -	%
<input type="radio"/>			/ /		- - -	%
<input type="radio"/>			/ /		- - -	%

* Required Fields

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➤ Enter Beneficiary Information then click “Next”.

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Enroll Participant

Please enter your deferral amount for each pay period.

NOTE

- Your request is not complete until the receipt of a confirmation number.

DEFERRALS

Type	Current	Minimum	Maximum	Amount	Dollar/Percent
Pre Tax	0	1%/\$1.00	100%/\$46,000.00	25	<input type="radio"/> Dollar <input checked="" type="radio"/> Percent Calculate

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➤ Enter Deferral Information then click “Next”

Investment Allocation Page

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Enroll Participant

Please add/change your investment allocations for future contributions.

NOTE

- If you do not select an investment and allocation, your contribution will be allocated to the [default funds](#) selected by your employer.
- You must enter whole percentages.
- If you no longer wish to invest in a fund, change the percentage to zero.
- Your request is not complete until the receipt of a confirmation number.

INVESTMENT ALLOCATION

Fund Name	Employer	Employee	Rollover
71 - VantageTrust PLUS Fund	50 %	50 %	50 %
Ci-VT Vantagepoint Milestone 2015	50 %	50 %	50 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
- Click For List of Funds ->	0 %	0 %	0 %
Total	100%	100%	100%

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➤ Select Investments and Allocation % then click “Next”.

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Enroll Participant

ENROLLMENT VERIFICATION

Please verify the information you have entered. If correct, please Submit your request. To make changes, click on EDIT links.

NOTE

■ Your request is not complete until the receipt of a confirmation number.

PERSONAL INFORMATION

Gender	Male
Mailing Address	123 NOTA GAIN LANE APT 2
City, State, Zip	CORAL SPRINGS, FLORIDA, 33321
Daytime Phone	202-962-4600
Evening Phone	954-545-5864
Job Title	
Email	uattesting@icmarc.org

BENEFICIARIES [EDIT](#)

Beneficiary Type	Last OR Trust/Charity/Estate Name	First Name	Birth Date	Relation	SSN	Percent
Primary	Patterson	jill	04/11/1969	Other	***-**-5555	100%
Contingent	holt	paul	10/19/1979	Other		100%

DEFERRALS [EDIT](#)

Deferral Type	Amount	Dollar /Percent
Pre Tax	25	Percent

INVESTMENT ALLOCATION [EDIT](#)

Fund	Employer	Employee	Rollover
VantageTrust PLUS Fund	50%	50%	50%
VT Vantagepoint Milestone 2015	50%	50%	50%

E-Signature Authorization

I acknowledge that I have read and agree to the following disclosure:

I have received and read the current VantageTrust Company's Making Sound Investment Decisions: A Retirement Investment Guide and the appropriate prospectus. I understand that ICMA-RC has established required procedures for internet and telephone transfers that include personal identification numbers, recording of instructions, and written confirmations. In the event I choose to transfer funds by internet or telephone, I agree that neither the VantageTrust Company, ICMA-RC, ICMA-RC Services, LLC, nor VantageTrust Transfer Agents, LLC, will be liable for any loss, cost, or expense for acting upon any internet or telephone instructions believed by it to be genuine and in accordance with the required procedures.

As required by law and under penalty of perjury, I certify that the Social Security number (Taxpayer Identification Number) I provided is correct.

I hereby agree to this disclosure by selecting the "I Accept" option below in lieu of my actual signature.

I Accept ☒ Date 11/17/2011

[Submit](#) [Cancel](#)

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- Verify information entered.
- To make corrections, select "Edit" next to the appropriate section.
- To complete the enrollment, select the checkbox next to "I Accept" then click "Submit".

Enrollment Confirmation Page

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Welcome, CHRIS P. BACON

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Enroll Participant

Your enrollment has been submitted. Please note that the current time is 2:43 PM. The cutoff time for your enrollment information to be processed on Nov 17, 2011 is 4:00 PM EST. If you submit your information before the cutoff time, it will be processed on Nov 17, 2011, otherwise it will be processed the next business day that the New York Stock Exchange is open.

Online Help is always available by clicking the "?" icon or 'help' links. For additional assistance, please contact Investor Services toll-free at 1-800-669-7400. We're happy to assist you Monday through Friday, 8:30 a.m. - 9:00 p.m., Eastern Standard Time.

Thank you for your business and we're glad you've chosen the "public sector expert" for your retirement planning and investing needs.

CONFIRMATION

- Your confirmation number is 201111175990.
- It will be processed on 11/17/2011.
- Please print this page for your records.

PERSONAL INFORMATION

Gender	Male
Mailing Address	123 NOTA GAIN LANE APT 2
City, State, Zip	CORAL SPRINGS, FLORIDA, 33321
Daytime Phone	202-962-4600
Evening Phone	954-545-5864
Job Title	
Email	uatesting@icmarc.org

BENEFICIARY INFORMATION

Beneficiary Type	Last OR Trust/Charity/Estate Name	First Name	Birth Date	Relation	SSN	Percent
Primary	Patterson	jill	04/11/1969	Other	***-**-5555	100%
Contingent	holt	paul	10/19/1979	Other		100%

DEFERRAL INFORMATION

Deferral Type	Amount	Dollar/Percent
Pre Tax	25	Percent

INVESTMENT ALLOCATION INFORMATION

Fund	Employer	Employee	Rollover
VantageTrust PLUS Fund	50%	50%	50%
VT Vantagepoint Milestone 2015	50%	50%	50%

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➤ Print this page for your records.